



Indiana Family and Social Services Administration 402 W. WASHINGTON STREET, P.O. BOX 7083 INDIANAPOLIS, IN 46207-7083

Anne Waltermann Murphy, Secretary

Date:

January 19, 2010

To:

Stephanie Taylor, IDOA Senior Account Manager

From:

Patricia Casanova, Medicaid Director

Room W461

402 W. Washington St. Indianapolis, IN 46204

Subject:

Recommendation of Selection for RFP 9-84

External Quality Review (EQR) Services for the CHIP program

For the OMPP

#### Estimated Amount of Contract: \$622,940.00 over two years

Based on the evaluation of our team, we recommend for selection Burns & Associates, Inc., to begin contract negotiations to provide EQRO services for the Hoosier Healthwise (HHW), Healthy Indiana Plan (HIP), and Children's Health Insurance Program (CHIP).

The evaluation team received two (2) proposals:

- Burns & Associates, Inc.
- Briljent

The proposals were evaluated by a five (5) member team according to the following criteria established in the RFP:

- Adherence to Requirements (Pass/Fail)
- Management Assessment/Quality (35 points)
- Indiana Economic Impact (15 points)
- Buy Indiana/Indiana Company (10 points)
- Minority Business Participation (10 points)
- Women-Owned Business Participation (10 points)
- Price (20 points)

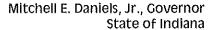
The proposals were evaluated according to the process outlined in section 3.2 of the (Evaluation Criteria) of the RFP.

Scoring was as follows:

Step1: Adherence to Mandatory Requirements:

Both proposals were reviewed for adherence to mandatory requirements.







Indiana Family and Social Services Administration 402 W. WASHINGTON STREET, P.O. BOX 7083 INDIANAPOLIS, IN 46207-7083

Anne Waltermann Murphy, Secretary

Burns & Associates, Inc., and Briljent passed the mandatory requirements. Burns & Associates, Inc., and Briljent were then evaluated based on their Business Proposal, Technical Proposal, and Cost Proposal.

### Step 2: Management Assessment/Quality and Cost:

Management Assessment/Quality evaluation consisted of the Business and Technical Proposal sections.

#### A. Business Proposal

For the Business Proposal evaluation, the team considered each Respondent's response regarding references and expertise in the following key areas:

- 1) Previous experience in External Quality Reviews in accordance with CMS protocols
- Previous experience in Evaluation projects of public health care program, such as 1115 waiver programs or other health care programs for the uninsured
- 3) Must qualify as "independent" in accordance with 42 CFR 438.354(c)
- 4) Project Tem Experience and Sufficiency
- 5) Corporate Experience, including prime and sub-contractor(s)
- 6) Analytical Methods and Technical Resources
- 7) Financial Stability

The evaluation team assessed the bidders' demonstrated expertise rather than just experience in the above noted areas.

### B. Technical Proposal

For the Technical Proposal evaluation, the Evaluation Team considered each respondent's offered approach and ability to perform the following:

- Proposed approach for completing an annual external quality review for 3 HHW and 2 HIP MCOs and produce a technical report of the results, in accordance with federal requirements at 42 CFR 438, Subpart E – External Quality Review
- 2) Proposed approach for completing an annual independent evaluation report for the CHIP program, in accordance with State requirements at IC 12-17.6-2
- 3) Proposed approach for completing an annual CHIP CMS report, in accordance with federal requirement 42 CFR 457.750
- 4) Proposed approach for completing a quarterly monitoring and assessment tool which includes the established performance criteria and evaluation measures, in accordance with IC 12-17.6-2-6





Indiana Family and Social Services Administration 402 W. WASHINGTON STREET, P.O. BOX 7083 INDIANAPOLIS. IN 46207-7083

Anne Waltermann Murphy, Secretary

The Evaluation Team's score was based on a review of each Respondent's proposed approach to each section of the Statement of Work, as well as specific questions the Respondents were asked to respond to through the RFP and clarification process.

### **Management Assessment/Quality Scores:**

During the Business and Technical Proposal evaluation, the Evaluation Team observed the following regarding each Respondent. These remarks also correlate to the scoring as shown in Table 1.

### Vendor #1- Burns & Associates, Inc.

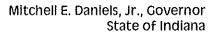
The Vendor presented a project team with strong experience and a broad knowledge base, particularly with regard to technical and Medicaid issues. This vendor has more resources available to it than the other vendor and the prime vendor does most of the work. The Burns data systems are already developed and have been refined based on previous Indiana experience. This vendor also demonstrated an understanding of local and national policies, and a detailed understanding of CMS EQR protocol and scoring tools. Burns & Associates, Inc, further indicated that they would devote adequate staff hours to this project overall, and were appropriately allocated across the various project deliverables.

#### Vendor #2- Brilient

The Vendor presented a proposed Project Manager with very limited experience, and it appears that subcontractors would be doing the majority of the project work. The project team was weak on clinical experience, and relevant Indiana experience was also lacking. There was no resume for the proposed staff for research design, EQR protocol, data base extraction, and technical support staff member. This vendor did not present any data resources allocated for EQR focus studies, and they were sketchy on analytic methods and technical resources. In addition, they did not propose any data resource hours to the quarterly monitoring and assessment tool, which is a very data-heavy deliverable. Overall, this vendor did not demonstrate a thorough understanding of CMS requirements for this project, and they have underestimated potential data issues and the number of staff hours necessary to meet project requirements.

### Results of the Management Assessment/Quality Scores:

Respondent	Management Assessment/Quality
Burns & Associates, Inc.	25.69
Briljent	15.69





Indiana Family and Social Services Administration 402 W. WASHINGTON STREET, P.O. BOX 7083 INDIANAPOLIS, IN 46207-7083

Anne Waltermann Murphy, Secretary

#### Cost Proposal

As noted on page 27 of RFP 9-84, any proposal not meeting a minimum threshold of 25 points for Criteria 2 (Management Assessment/Quality) may not be eligible for the "short list", and any proposal not making the "short list" will not be considered for any further evaluation. Briljent's score of 15.69 did not qualify them for the "short list".

### Target Pricing/BAFO

During price negotiations, Burns & Associates, Inc., made three best and final offers. The third offer represented a cost savings of 22% over its initial offer.

## **IDOA Scoring**

IDOA scored the final respondent in the following areas – Buy Indiana (10 points), Indiana Economic (15 points), and Minority and Women Business Participation (10 points each) using the criteria outlined in the RFP. When necessary, IDOA clarified certain Buy Indiana, Indiana Economic Impact, and Minority and Women Business Participation information with the Respondent. Once the final material was tabulated the scores were as follows:

### **Final Overall Evaluation Scores**

Respondent	Management Assessment/Quality	Price	Buy Indiana	IEI	MBE	WBE	Total Score
Burns & Associates	25.69	20.00	0.00	15.00	10.00	10.00	80.69

#### Award Summary:

With a strong performance in both the Management Assessment/Quality and Cost proposal scoring, Burns & Associates, Inc., had a final point total of 80.69 out of 100 points. Burns & Associates' established expertise in data analysis and reporting is well suited for providing the EQRO services requested for the State of Indiana. As a result of the score tabulation, Burns & Associates, Inc., is recommended for award.

This agreement will be for a period of two (2) years with the option to renew for an additional two (2) years.





Family & Social Services Administration

Mitchell E. Daniels, Jr., Governor State of Indiana

# Indiana Family and Social Services Administration 402 W. WASHINGTON STREET, P.O. BOX 7083 INDIANAPOLIS, IN 46207-7083

Anne Waltermann Murphy, Secretary

Name Bugh Broply	Date 1 19/10
Ginger Brophy 🔾	•
Name Alexue Al	Date_ 1/20/10
Glenna Asmus	Date 1/19/10
Name La Lalelle Terri Willits	Date / 11110
Name Stephanie Baume Stephanie Baume	Date 1/19/10
Stephanie Baum &	
Name Kary Maro/My Peggy Novothy	Date//19/10
Peggy Novothy //	
RFP #09-84 Evaluation Team	
Paranova	
Patricia Casanova	
Director of Medicaid	